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UNECE TIMBER COMMITTEE YEARBOOK 2004

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ABSTRACT

The aim of the *UNECE Timber Committee Yearbook 2004* is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. Further information about the publications or any other aspect of the Committee's work may be obtained from the secretariat:

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THE UNECE TIMBER COMMITTEE YEARBOOK 2004

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I. THE TIMBER COMMITTEE'S ACTIVITIES IN 2003

All the Committee's activities are carried out jointly with the FAO European Forestry Commission in the context of an integrated programme of work.

1. Promotion of sustainable forest management (SFM) in the region

The Committee and the Commission continued to play an active role in the regional and global forest dialogue. In addition to the more specialised contributions listed elsewhere in this Yearbook, they provided essential support to the fourth Ministerial Conference on Protection of Forests in Europe (MCPFE), held in Vienna Austria in April 2003. In particular, UNECE/FAO, with the Vienna MCPFE Liaison Unit and other partners prepared a report on the State of Europe's Forests for the Conference, based on the indicators of sustainable forest management in the region. UNECE/FAO also monitored forestry assistance to countries in transition, participated in the revision of the MCPFE indicators in the light of experience, and organised a number of meetings, seminars and reports, notably on social aspects, in the framework of the MCPFE work programme. All these outputs are reported on elsewhere.

The UNECE/FAO secretariat, with the MCPFE Liaison Unit, also briefed the UN Forum on Forests on the methods and results of regional forest cooperation in Europe, in order to strengthen the regional dimension of the global forest dialogue.

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2. Forest Resource Assessment (FRA)

The main focus in this work area during the reporting period was the UNECE/FAO contribution to the preparation of the global FRA update 2005. The Geneva secretariat and the regional FRA Team of Specialists participated actively in the elaboration of the FRA 2005 enquiry and guidelines. The regional FRA contributed, in particular, to the work of the global FRA Advisory Group (AG).

The UNECE/FAO regional FRA Team of Specialists met in Dresden in September 2003. The team reviewed the regional FRA work in the light of the preparation for the global FRA update 2005, and discussed the directions of future FRA-related activities. The future FRA work will be even more closely integrated than before into the international processes on Criteria and Indicators (C&I) for Sustainable Forest Management (SFM), and specifically into the MCPFE and Montreal processes.

The report on the *State of Europe's Forests 2003*, reviewing the situation of sustainable forest management in Europe, was submitted to the Ministerial Conference on the Protection of Forests in Europe (MCPFE). The report was based on updated and validated FRA-2000 information, collected by UNECE/FAO during the years 2002-2003. The FRA statistical data responded to the majority of the pan-European criteria and quantitative indicators for SFM. This work has also served to update he global FRA dataset.

The study *Analysis of Long-term Historical Changes in European Forest Resources* is currently being prepared for publication. This is a promising effort to construct comparable time series for the period from 1950 to the present.

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3. European Forest Sector Outlook Studies (EFSOS)

During 2003, a number of EFSOS discussion papers were prepared and will be issued in early 2004. The major conclusions were discussed by the Timber Committee. The main report will be finalised and presented in 2004. The main conclusions concern the shift in the balance of the European forest sector to the east, and the necessity to manage this change. The importance of taking a holistic approach and understanding the interactions between forest sector policy and policy for other sectors is also the subject of a specific study.

The study expects, on the basis of econometric projections and models of the forest resource, that consumption and production of forest products will continue to rise, faster in eastern than in western Europe, but that the supply of wood from European forests and from elsewhere in the world is sufficient to ensure that any likely level of demand can be met on a sustainable basis from existing resources

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4. Forest products markets

The UNECE/FAO *Forest Products Annual Market Analysis, 2002-2004* covers forest products market and policy developments in the UNECE region of Europe, North America and the CIS countries. Some of its main findings are:

- Forest law enforcement, governance and trade policies are being developed as countries build partnerships to control illegal logging and the trade of forest products sourced from illegal harvesting;
- UNECE region forest products markets turned upwards in 2002, overcoming the dip in 2001, achieving some record levels;
- Region wide for all products, the UNECE Timber Committee forecasts growing consumption in 2003 and 2004;
- Certified forest area worldwide extended to over 150 million hectares by mid-2003, 90% of which is in the UNECE region. However, not all potentially labelled certified forest products reach final consumers;
- Total roundwood consumption for the UNECE region was 1.3 billion m^3 in 2002, and forecast slightly up in 2003 and 2004, staying well within sustainable harvest limits;

Team of Specialists on Forest Products Markets and Marketing

The mandate of the Team was extended, and simultaneously simplified in 2003 for one more year. The Team met the day before the annual Timber Committee Market Discussions in October 2003.

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5. Trade, Environment and Forests – Working Together for Sustainable Development

The FAO and UNECE jointly convened the Roundtable entitled Trade, Environment and Forests: Working Together for Sustainable Development. The Roundtable provided a forum for information

and opinion exchange on current and relevant issues in the forestry, environment and trade sectors. The meeting prompted a rich and diverse debate which covered a wide range of topics and served to illuminate the theme of trade, environment and forests and how trade could contribute to sustainable development. Representatives of Member States of the World Trade Organization (WTO) and observers, inter-governmental organizations, non-governmental organizations, private sector and other entities involved in the forestry, environment and trade sectors participated. The topics discussed were:

- Trade liberalisation and forest products trade;
- Forest-related multilateral environmental agreements (MEAs) and current policy debates in WTO;
- Forest and forest products certification;
- Trade, rural poverty and the environment;
- Markets for forest environmental services; and
- Private sector perspectives on developments of trade in forest products and services.

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6. The sound use of wood

The seminar on Strategies for the sound use of wood was held in Poiana Brasov, Romania, in March 2003. The seminar concluded that:

- The objective of governments, forest based industry and the forest sector as a whole should be greater, better and appropriate use of wood from sustainably managed forests in technically and economically competitive and environmentally appropriate products and systems, of high quality. These should build on woods heterogeneity and advantages so as to influence and fulfil market needs.

- Wood from sustainably managed forests is an environmentally friendly raw material, with many technical and economic advantages to the consumer. It is renewable and frequently reusable and/or recyclable, and it is finally a source of energy. It is non-polluting when growing in the forest, and less energy and resource intensive in processing and use than many of its competitors. It has low carbon intensity compared to competing materials.

- The forest and timber sector plays an important role for employment and rural development. Forests, public and private, provide the multiple benefits which society rightly expects from forests, including conservation of biological diversity, protection against erosion and other natural hazards, facilities for recreation, landscape beauty, cultural sites and many more.

- However, the fact that wood is procured from sustainable forest management has environmentally compatible properties and provides diverse social and environmental benefits, does not guarantee its competitiveness in the market place. There, wood and its derivatives have to compete on technical performance, service, price and image with products made from other, often less environmentally compatible, materials.

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7. Close to nature forestry

The FAO/ECE/ILO seminar on Close to nature forestry was held in Slovakia in October 2003. The seminar concluded that:

- Close to nature forestry achieves the principles and objectives of sustainable forest management. It integrates the demands for wood products, biodiversity and other functions of the forest.
- Even if there is no generally accepted definition of close to nature or continuous cover forestry, there seems to be agreement about its basic principles.
- There is no single optimal strategy for close to nature forestry since it has to take into account a wide range of ecological, economic, social and cultural aspects as well as different site and stand conditions, and the diverse interests of stakeholders.
- Close to nature forestry has to be understood as a flexible system that provides options rather than rules that must be applied strictly.
- The shift to close to nature forestry is a long-term process. Priorities for the conversion of stands are needed.

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8. Forest operations improvements in farm forests

The FAO/ECE/ILO seminar, with the participation of IUFRO, was held in September 2003 in Logarska dolina at the invitation of the Slovenian authorities. Participants exchanged experience and information on improvements of forest operations in farm forests considering in particular cost efficiency of operations, environmental impacts, the social dimension in terms of employment and income as well as contribution to rural development. It seems that in most parts of Europe the forest sector is facing similar problems in relation to farm and family forests. A great variety of forestry extension, education and training programmes exist but more emphasis should be placed on courses on forest operations for sustainable forest management and especially marketing for forest products.

Special attention was drawn to the need for forest associations to support the development of the protection and utilization of farm forests to improve the revenue situation. Family forests need to be supported through sustainable management and an efficient extension service that helps them recover the added value they produce (e.g. landscape). It is necessary to stimulate the awareness of family forest owners to be part of an economic and social system that manages strategic resources (e.g. environment) and has great potential for development. There is a gap between the policies for family forestry and owner attitudes and knowledge on forestry. Policy makers need to take account of owner attitudes and owners need to be aware of the motivations and drivers of policies. Good initiatives in some countries already exist, but cooperation among forest owners should be improved. Family forests should be respected as a cultural, social and environmental heritage. They are a key part of the future development of the forest sector and a benefit to society as a whole.

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9. Assistance to countries of central and eastern Europe in transition

The monitoring of activities in the forestry sector of central and eastern European countries in transition (CEEC) in line with the MCPFE Resolution H3 continued. This work is mainly being implemented by means of the electronic database which is updated on a continuing basis and made available at the website. A report, which included the analysis of these data, was published and presented to the MCPFE Conference (Vienna, April 2003).

The preparation of *Forest and Forest Products Country Profiles* by national experts, mainly of the central and eastern European and CIS countries, has also continued depending on demands and resource availability. The profiles cover the key issues of the forestry sectors of central and eastern European countries.

A country profiles on Georgia was published and profiles are underway on Ukraine (in press), Bulgaria and Serbia and Montenegro (in preparation).

The above work is supported and directed by the UNECE/FAO Team of Specialists on Countries in Transition, which provides periodic expert review of the situation and needs of the countries concerned. The forestry and forest product sectors in many central and eastern European countries have undergone important structural and institutional changes; many of them have now nearly completed the "transition" period, and will soon become EU members.

The Team of Specialists has contributed to the development of the market-oriented structures and market relations in the forestry and forest products sectors of UNECE countries. It is time now for the Team to overview the current situation and trends in the forestry sector developments, to evaluate its own work, and to recommend future UNECE/FAO and MCPFE activities in this area. The next (and final) meeting of the Team of Specialists will be in Warsaw Poland, in March 2004.

Another activity, which contributes to the developments in the forestry sectors of CEEC, is the annual conference on *Changing Role of State Forests*. The fourth Conference was organized by *l'Office National des Forêts*, France (May 2003, Chambord, Blois). The participants of the *State Forests* conferences benefited from the exchange of information and best practices between state enterprises and sharing experiences among the forest stakeholders. The next Conference of the European State Forest Organizations will be held in June 2004 in Finland (Hämeenlinna). The main topics on the agenda will be: (a) recent changes in state forest organizations, (b) social sustainability in forest management, and (c) impact of the EU membership for new members.

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10. UNECE/FAO Forest Communicators Network

The Forest Communicators Network (FCN) met twice in 2004. At the kind invitation of the UK Forestry Commission, the FCN met in Edinburgh in May. It began with a 2-day "Train the Trainers" workshop on "Dealing with Media: Crafting Your Strategy and Message for Maximum Effect". The session provided information on conducting effective interviews, as well as an opportunity for an exchange of ideas among participants. Although Train the Trainers' sessions were originally crafted to fulfil the mandate of

forestry-related public relation capacity building in central and eastern European countries, they have proved valuable for all countries and thus have become a regular feature of meetings.

The meeting provided an opportunity for the 3 subgroups of the FCN to show progress on:

- Consumer behaviour towards forests and forest-based industries;
- Strategic approaches for building national PR capacity;
- Best practices in forest communications.

The Edinburgh forum was the first opportunity for the whole FCN to focus on Communications Aspects of Wood Promotion through presentations by the North American-based Wood Promotion Network and the UK-based Wood. For Good campaign.

The FCN also met in Quebec City, Quebec, Canada in September in conjunction with the World Forestry Congress. Subgroup activities were covered, as well as topics concerning the public relations in conjunction with the WFC and the Canadian Model Forest Network. The Team made plans for their 2004 meeting to be held in Bulgaria on 1-4 June.

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11. Forest certification in the UNECE region

The Timber Committee and the European Forestry Commission continued to monitor developments in forest certification and in certified forest products markets in the UNECE region in 2004. Some of the findings from a chapter in the *Forest Products Annual Market Analysis, 2002-2004* were:

The area of certified forests in the world has further grown over the last year, reaching about 150 million hectares by mid-2003, mainly driven by the Pan European Forest Certification (PEFC) system and the Sustainable Forestry Initiative in the United States.

The potential supply of certified forest products (CFPs) has grown in parallel with the area certified, and is estimated at almost 300 million m^3 annually worldwide, close to the annual industrial roundwood consumption of Europe (excluding the Russian Federation). Still, only a fraction of the wood supplied from certified forests is actually traded as (labelled) CFPs, reflecting the difficulty of finding viable markets and stable supply through the chain-of -custody.

Consumer awareness of CFPs continues to be low, even in the more advanced markets in western Europe; however, growing familiarity with the FSC logo is claimed in the United Kingdom, and PEFC is stepping up its communications campaigns. Public procurement is an important driver of demand in several key importing countries, including Germany and the United Kingdom, and is expected to become more visibly so for tropical wood. The illegal logging issue has dominated public discussion in 2002 to 2003, from which it emerged that legality of the wood traded is not to be confused with the quality of management.

These above findings were the basis of discussion at the annual Timber Committee Market Discussions in October 2004.

Results of the 2003 *Forest certification update for the UNECE region* are expected to be published in 2004.

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12. Wood energy policies affect forest products markets and forest management

In the annual Timber Committee Market Discussions and a special Policy forum: Forests, wood and energy, both held at the Committee session in October 2003, wood energy polices and their effects on forest management and forest products markets were discussed. The Committee's market statement said:

"Wood-based energy has been and is being promoted by governments and forest owners throughout Europe as a means to improve forest viability, provide rural employment, promote renewable resources and reduce CO2 emissions from fossil fuels, and thereby mitigate climate change. In treating this topical issue, the Committee felt wood energy should be promoted by governments, noting an excess of growth over removals in the region's forests, while acknowledging the concern of some industry sectors for raw material competition."

The Policy Forum and the outcomes of the Timber Committee Market Discussions were summarized in a press release which stated: "Biomass is one of the renewable energies with the greatest potential for expansion, and wood is by far the largest component of biomass energy. ... Wood energy is already widely used and is available on a sustainable basis, for relatively modest investment, all over the UNECE region. Wood energy not only provides heat and light, but also income and employment, and contributes to carbon sequestration in the context of climate change. In most areas, with the prevailing structure of energy prices, wood energy is at present not economically competitive with fossil fuels. However, several regional initiatives have demonstrated the feasibility of significantly increasing the volume of wood used for energy. The development of a market for wood energy represents a significant opportunity to raise the income of forest owners, whose economic viability is threatened in many areas, often arising from a lack of local demand, and in general to promote rural development. Governments should create supportive economic and technical conditions for an expansion of the production and use of wood energy, in the context of broader policy frameworks, for renewable energies and for the forest and timber sector, taking account of the legitimate interests of all stakeholders, including some wood-using industries who would face increased competition for their raw material supplies."

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13. Illegal logging and illegal activities in the forestry sector

"Illegal logging and illegal activities in the forestry sector: Overview and possible issues for the UNECE Timber Committee and FAO European Forestry Commission" was the title of a paper by Mr. Carl-Eric Guertin. The ensuing discussion resulted in the following passage in the Committee's Market Statement:

"The Timber Committee examined illegal logging, an issue affecting forest products markets. Forest law enforcement, governance and trade (FLEGT) is at present the main issue in the forest sector and the Committee's annual Market Discussions provided a forum for a multi-stakeholder discussion. Illegal

logging denies revenues to governments, industries and forest owners, puts downward pressure on forest products prices, negatively affects workers and compromises sustainable forest management. The Committee wants to work together with other organizations to determine the extent and causes of illegal logging and trade."

II. ACTIVITIES PLANNED FOR 2004 AND 2005

This section is intended to provide readers with information on the Committee's forthcoming activities. It is not a definitive programme, as additions or deletions sometimes have to be made at fairly short notice. Meetings are formally announced by the circulation of a provisional agenda at least three months before their scheduled date, and a press release is also issued.

Attendance at seminars, symposia and study tours organized by the Committee is open to experts in the subjects to be discussed, with permission of their Governments. Further information about all this activities is available on request from the secretariat.

Joint session of the Timber Committee and the European Forestry Commission

The session's Policy forum will discuss (subject to confirmation): Forest products market developments and prospects, Long term challenges for forest and timber policies and institutions in a wider Europe and Forest law enforcement and governance: a significant problem in Europe? The session will also agree on the results of the new UNECE/FAO strategic review process and adopt the work programme for 2005-2008.

Statistics

The Committee will continue to make available at the website its regular statistics on forest products production and trade, trade flows of forest products, the monthly prices for forest products, and the results of the annual enquiry on forest fire.

Forest products markets

The Committee's regular review and analyses of short-term developments in forest products markets, the results of the Committee's discussions at its annual session, when it prepares forecasts for the current and forthcoming year is published in the *Timber Bulletin*. The *Forest Products Annual Market Analysis* is produced in a new 2-stage approach: 1. a draft based on the Joint Forest Sector Questionnaire statistics before the annual Timber Committee Market Discussions, and 2. a final version incorporating the Committee's forecasts and country market statements.

Forest Economics and Statistics

The FAO/ECE Working Party on Forest Economics and Statistics meets yearly. It will hold its twenty-sixth session in Geneva from 15-17 March 2004. It will review the European Forest Sector Outlook

Studies (EFSOS), Forest Resource Assessment, Market analysis and forecasts and collection and dissemination of statistics and interorganization cooperation in this field.

Assistance to countries in transition of central and eastern Europe

The programme of assistance to countries in transition is reviewed regularly on the basis of recommendations of the team of specialists to ensure that it fulfils the expectations of this group of countries. The next meeting of the team will be held in Warsaw, Poland from 3 to 6 March 2004.

Country profiles on transition countries of central and eastern Europe will continue to be published.

Other meetings in 2004 to be held under the auspices of Timber Committee and the European Forestry Commission

Title:	**Workshop on policy conclusions and options arising from European Forest Sector Outlook Study (EFSOS)**
Date:	To be decided
Location:	Geneva
Objectives:	To present the EFSOS study to the policy community (notably representatives to MCPFE). The workshop will stress on the cross-sectoral dimension of the analysis, which uses new concepts and ideas.
Target groups:	• Forest policy makers; • Forest service officials; • Forest managers; • Forest industry; • Environmental and other non-governmental organizations; • Researchers and educators.

Title:	Workshop on extent and causes of illegal logging in the UNECE region
Date:	September (to be confirmed)
Location:	Geneva
Objectives:	Following the discussions at the Timber Committee in October 2003 and the chapter on Illegal logging of the ***Timber Bulletin*** *Forest Products Annual Market Analysis, 2002-2004,* it appeared that there was a need to determine the extent and causes of illegal logging and trade. Furthermore, with the globalisation of markets illegal logging had become a domestic problem in all countries.

	The workshop is being organised as a first step in an ongoing process. The information gathered at the workshop would be built into case studies. A policy discussion will take place at the next session of the Timber Committee. Other follow-up activities are to be decided.
Target groups:	• Forest policy makers; • Forest service officials; • Forest managers; • Forest industry; • Environmental and other non-governmental organizations;

Forest technology management and training

The Joint FAO/ECE/ILO Committee will hold its twenty-fifth in Groningen, the Netherlands session from 12-16 September 2004, in conjunction with the seminar on building bridges between people and forests: changing roles of State Forest Services. In 2004 the Joint Committee will celebrate the fiftieth anniversary of its establishment, this occasion will be marked by a publication on the main achievements of the Committee over the period.

The following seminars and workshops will be organized in 2004 and 2005 under the auspices of the Joint Committee:

Title:	**Conference on Forest Fire Management and International Cooperation in Fire Emergencies in the Eastern Mediterranean, Balkans and Adjoining Regions of the Near East and Central Asia**
Date:	30 March - 3 April 2004
Location:	Antalya, Turkey
Objectives:	The Eastern Mediterranean Region, including the Balkan countries, the UNECE member states of the Near East and Central Asia, and other neighbouring countries of Central Asia, have recently suffered major forest and other wildland fire problems. The causes of an increasing occurrence of wildfires in forests and other wildlands, including the underlying reasons for increasing human-caused fires, vary within the region and are due to: • transition from centrally planned to market economies • national to regional conflicts, creation of new nations • increasing population growth and land-use pressure • regional climate change towards increase of extreme droughts It has been recognized that no regional activity is underway to establish cooperation in wildland fire management, including wildland fire science. The objectives of the conference are to provide (a) a forum in the Eastern Mediterranean, Balkan and adjoining Regions of the Near East and Central Asia, (b) prepare mechanisms for information and resources exchange in forest and other wildland fire

	management within the region, including the establishment of partnerships for joint activities in fire research, training and policy development, and (c) prepare proposals to governments and international organizations of the region to establish mechanisms for sharing resources in large fire emergencies in accordance with existing international procedures..
Target groups:	The seminar is intended for all persons working with or in forests, forestry and forest industry. Experts from UNECE and other UN countries may attend the conference. • Forest policy makers, Forest service officials and Forest managers; • Forest industry; • Environmental and other non-go\. \.mental organizations; • Representatives of local governme\. • Researchers and educators.

Title:	**FAO/ECE/ILO Seminar on building bridges between people and forests: changing roles of State Forest Services**
Date:	12-16 September 2004
Location:	Groningen, the Netherlands
Objectives:	This seminar's theme is timely and challenging. Timely because the world seems to have entered into an ever-accelerating change of paradigms, international relations, values, standards, communication techniques and participatory policy making processes. Moreover, there is a growing imbalance between economic activities and the conservation of nature and the environment. These changes impact how people see and value nature, including forests, and the way national governments and society feel and take responsibility for forest policy and management. The challenge is to clearly identify which modifications of land use and forest policy are required to cope with these societal changes. Which regions or countries are able to demonstrate successful forest policy adaptation? To what extent do these adaptations have an impact on the tasks and organisation of forest authorities or forest services? The seminar will provide answers to these and other questions, and will view the role of forests as an element of the development of global society. The seminar theme will be tackled by discussing three issues: a) A changing (global) society. Driving forces and characteristics. To identify major trends in society to demonstrate their relevance to forests and forestry b) Relevance to forest policy. How do politicians and other policy makers mould forest policies in response to a changing society? c) What are the consequences of these new policies for the tasks and organisation of national forest services and how do they achieve the results they are required to deliver?
Target groups:	The seminar is aimed at all those involved in forestry, in particular forest policy makers, forest service officials, forest managers, environmental and other non-governmental organizations, representatives of local governments and of research institutions.

Title:	**FAO/ECE/ILO Workshop on the role of forests in torrent control and watershed Management**
Date:	11-15 October 2004
Location:	Zidlochovice, South Moravia, Czech Republic
Objectives:	The workshop is being held on the occasion of the 120th anniversary of the Torrent Control Service of the Czech Republic and the 50th anniversary of forestry, hydrological research, to underline the importance of forests in connection to the follow-up of the International Year of the Mountain and Fresh Water. To present research results on the interface between forests, forest management and incidence of heavy rainfall and floods.
Target groups:	• Experts interested in forest management, particularly of mountain watersheds; • Forest service officials; • Local civil services; • Policy makers.

Title:	**EU concerted action STODAFOR Seminar on Disaster preparedness in forestry (tentative title) in cooperation with Joint FAO/ECE/ILO Committee on Forest Technology, Management and Training**
Date:	27-29 October 2004
Location:	Freiburg, Germany
Objectives:	Following the windfall of December 1999, considering the extent of the damage caused to forests and the need to cope with the disaster, harvest and preserve windblown timber, carry out clear-up work and restore the forest ecosystems, there was a need to examine and exchange experiences and draw lessons. The EU concerted action STODAFOR was set up, under which CTBA (Centre Technique de l'ameublement et du bois) and the Forestry Research Station of Baden-Wuerttemberg, and other institutions, have cooperated to draw-up the experiences of the 1999 storms A report will be finalised in 2004 and the main objective of the seminar is to review, present, discuss and disseminate the results. The report will constitute an up-date to the FAO/ECE/ILO Model Forest Damage Manual, which was based on previous windblows and published in the 1990's.
Target groups:	• Forest service officials; • Forest managers; • Forest industry; • Researchers and forest workers' training institutions; • Environmental and other non-governmental organizations.

III. BIBLIOGRAPHICAL REFERENCES

The Timber Committee publications (other than reports and associated documents) have been organized since 1994, into the following five series:

Timber Bulletin	ECE/TIM/BULL/xx/x
Timber and Forest Study Papers	ECE/TIM/SP/x
Timber and Forest Discussion Papers	ECE/TIM/DP/x
Timber and Forest Information Series	ECE/TIM/INF/x
Timber and Forest Seminar and Workshop Proceedings	no symbol

The Committee publishes the ***Timber Bulletin***, which provides regularly, detailed information on the forest products sector: statistics on production, removals, trade (total and by origin and destination), prices; the results of an annual survey on forest fires; analyses of market developments and prospects for the coming year. The Timber Bulletin series is currently under review, see page 21 for the contents of the ***Timber Bulletin*** in 2003.

The ***Timber and Forest Study Papers*** are composed of the European Forest Sector Outlook Studies (EFSOS), Forest and Forest Products Country Profiles, Forest Resource Assessment publications, and other special studies.

The ***Timber and Forest Discussion Papers*** are intended to be a means of distributing current topical information in the forest and forest industries sector which might or might not become part of a more comprehensive study at some later time.

Unlike the *Timber Bulletin* and the *Study Papers*, the ***Discussion Papers*** have limited input from the secretariat and are published in their original language.

Timber and Forest Seminar and Workshop Proceedings are not published by the secretariat, but by the host country of such activities, this explains why there is no identification code.

Finally, the ***Timber and Forest Information Series*** which consists of this *Timber Committee Yearbook*. In 2003 the UNECE/FAO Timber Branch initiated a new quarterly publication, *The Timber Branch Newsletter*, which provides general information on the Timber Committee and the European Forestry Commission activities, as well as those of its joint subsidiary bodies. Issues of the *Newsletter* are posted at the website. A comprehensive list of publications appears on page 21 of this *Yearbook*.

Set out below are bibliographical references to those documents issued under the Committee's auspices in 2003, the **documents are described under the same headings as the text of the *Yearbook***. Further information may be obtained from the Timber Branch secretariat (see address on page ii).

1. PROMOTION OF SUSTAINABLE FOREST MANAGEMENT IN THE REGION, CONTRIBUTION TO THE MINISTERIAL CONFERENCE

International dialogue on forests, support to the global and regional processes (TIM/2003/4)

State of Europe's Forests 2003, jointly prepared by the MCPFE Liaison Unit Vienna and UNECE/FAO (Fourth MCPFE documents)
(PDF file: http://www.unece.org/trade/timber/docs/sfm/europe-2003.pdf)

2. FOREST RESOURCE ASSESSMENT

Forest Resources of Europe, CIS, North America, Australia, Japan and New Zealand (ECE/TIM/SP/17)

Guidance of work area 2: Forest resource assessment (focus on organization and direction of regional FRA work) (TIM/EFC/WP.2/2003/4)

Biological Diversity, Tree Species Composition and Environmental Protection in the Regional FRA-2000 (ECE/TIM/DP/33)

3. EUROPEAN FOREST SECTOR OUTLOOK STUDIES

Policy implications of EFSOS, European Forest Sector Outlook Study (TIM/2003/3)

Guidance of work area 3: Forest sector outlook studies (review of major draft outcomes of EFSOS) (TIM/EFC/WP.2/2003/5)

The Development of European Forest Resources, 1950 to 2000: A Better Information Base (ECE/TIM/DP/31) *–in processing*

Modelling and Projections of Forest Products Demand, Supply and Trade in Europe (ECE/TIM/DP/30) *–in processing*

Employment Trends and Prospects in the European Forest Sector (ECE/TIM/DP/29)

Russian Federation Forest Sector Outlook Study (ECE/TIM/DP/27) *–in processing*

Forecasts of the Economic Growth in OECD countries and central and eastern European countries for the period 2000-2040, a study prepared for the European Forest Sector Outlook Studies-EFSOS (ECE/TIM/DP/24)

4. FOREST PRODUCTS MARKETS

Timber Bulletin Forest Products Annual Market Analysis, 2002-2004 (ECE/TIM/BULL/2003/3)

The content of other issues of the Timber Bulletin in 2003 is set out on page 21 below.

Value-Added Wood Products Markets (ECE/TIM/DP/36) – *in processing*

Trends in the Tropical Timber Trade, 2002-2003 (ECE/TIM/DP/35) – *in processing*

RELEVANT FAO STATISTICAL PUBLICATIONS

(Available from: Distribution and Sales Section, Food and Agriculture Organization of the United Nations, Via delle Terme di Caracalla, I-00100 Rome)

FAO Yearbook of Forest Products 2002

5. TRADE, ENVIRONMENT AND FORESTS – WORKING TOGETHER FOR SUSTAINABLE DEVELOPMENT

Proceedings of the meeting:
(PDF file: http://www.unece.org/trade/timber/docs/other_mtgs/roundtable/proceedings.pdf)

6. THE SOUND USE OF WOOD

Report of the seminar (TIM/SEM.1/2003/2)

Draft proceedings of the Seminar (PDF file, 5,7MB)
(http://www.unece.org/trade/timber/docs/sem-1/papers/proceedings.pdf)

7. CLOSE TO NATURE FORESTRY

Report of the seminar (TIM/EFC/WP.1/SEM.57/2003/3)

PowerPoint presentations of seminar papers:
(http://www.unece.org/trade/timber/docs/jc-sem/sem-57/sem-57.htm)

The proceedings of the seminar are being prepared and will be available shortly.

8. FOREST OPERATIONS IMPROVEMENTS IN FARM FORESTS

Report of the workshop (TIM/EFC/WP.1/SEM. 56/2003/3)

The proceedings of the workshop are being prepared and will be available shortly.

9. ASSISTANCE TO COUNTRIES IN TRANSITION OF CENTRAL AND EASTERN EUROPE

Recommendations of the Debe Workshop on Countries in Transition (TIM/2002/6/Add.1)

Report on the implementation of resolution H3

The H3 database in ACCESS format is periodically updated and posted at the Timber Committee website (http://www.unece.org/trade/timber/h3/H3database.htm)

Forestry Cooperation with Countries in Transition (ECE/TIM/DP/28)

Forest and forest products country profiles

Forestry and Forest Products Country Profile: Ukraine (ECE/TIM/DP/32)
Forest and Forest Products: Country Profile: Georgia (ECE/TIM/DP/26)

10. UNECE/FAO FOREST COMMUNICATORS NETWORK

Report UNECE/FAO Forest Communicators Network meeting, 2003:
(http://www.unece.org/trade/timber/pr/meetings/meetings.htm)

11. FOREST CERTIFICATION IN THE UNECE REGION

Chapter in Forest Products Annual Market Analysis, 2002-2004 (ECE/TIM/BULL/2003/3)

Forest Certification update for the UNECE region, summer 2002 (ECE/TIM/DP/25)

12. ENERGY POLICIES AFFECT FOREST PRODUCTS MARKETS AND FOREST MANAGEMENT

PowerPoint presentations at Timber Committee session 2003:
(http://www.unece.org/trade/timber/docs/tc-sessions/tc-61/presentations/item-3.htm)

13. ILLEGAL LOGGING AND ILLEGAL ACTIVITIES IN THE FORESTRY SECTOR

PowerPoint presentations at Timber Committee session 2003:
(http://www.unece.org/trade/timber/docs/tc-sessions/tc-61/presentations/item-3.htm)

IV. LIST OF MEETINGS IN 2004 AND 2005

Note: The meetings are sub-divided into two categories: meetings marked (A) are open to delegates or approved representatives from all member countries of UNECE was well as from other countries that are members of the United Nations and organizations accredited to UNECE (or to FAO and ILO, in the case of meetings co-sponsored by them). Meetings marked (B) are those restricted to the countries or individuals nominated by their countries to take part in the activity concerned, e.g. a team of specialists. At the Committee's website (http://unece.org/trade/timber) an up-to-date calendar of meetings, can be consulted

2004

Dates	Location	Title
3-6 March	Warsaw, Poland	Meeting of the UNECE/FAO ToS on Countries in Transition (B)
15-17 March	Geneva	Joint ECE/FAO Working Party on Forest Economics and Statistics, 26th session (A)
29 March - 3 April	Antalya, Turkey	Conference on Forest Fire Management and International Cooperation in Fire Emergencies in the Eastern Mediterranean, Balkans and Adjoining Regions of the Near East and Central Asia (A)
1-2 April	Geneva	Joint UNECE Timber Committee and FAO European Forestry Commission extended bureaux meeting on the Strategic Review of the integrated programme (A)
May (to be decided)	Geneva	UNECE Timber Committee and FAO European Forestry Commission joint bureaux meeting (B)
1-4 June	Bulgaria	UNECE/FAO Forest Communicators Network meeting (B)
9-12 September	Groningen, the Netherlands	Joint/FAO/ECE/ILO Committee on Forest Technology, Management and Training, twenty-fifth session (A)
12-16 September	Groningen, the Netherlands	FAO/ECE/ILO Seminar on building bridges between people and forests: changing roles of State Forest Services (A)
September (to be confirmed)	Geneva	Workshop on extent and causes of illegal logging in the UNECE region (A)
3 October	Geneva	Meeting of the UNECE/FAO team of specialists on forest products markets and marketing (B)
4-8 October	Geneva	Joint session UNECE TIMBER COMMITTEE, 62nd session and FAO European Forestry Commission, thirty-second session (A)
11-15 October	Zidlochovice, South Moravia, Czech Republic	FAO/ECE/ILO Workshop on the role of forests in torrent control and watershed management (A)
27-29 October	Freiburg, Germany	FAO/ECE/ILO Seminar on Disaster preparedness in forestry (tentative title) in cooperation with EU concerted action STODAFOR (A)
(to be decided)	Geneva	Workshop on policy conclusions and options arising from European Forest Sector Outlook Study (EFSOS) (B)

2005

Dates	Location	Title
March (to be decided)	Geneva	Joint UNECE/FAO Working Party on Forest Economics and Statistics, 27th session (A)
March (to be decided)	Geneva	Intersecretariat Working Group on Forest Sector Statistics, 18th meeting (B)
September (to be decided)	Geneva	UNECE TIMBER COMMITTEE, 63rd session (A)

SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the UNECE (UN Economic Commission for Europe), based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the UNECE and participate in its work.

The UNECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;

2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;

3. Provide the framework for cooperation e.g. by organizing seminars, workshops and *ad hoc* meetings and setting up time-limited *ad hoc* groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;

4. Carry out tasks identified by the UNECE or the Timber Committee as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;

5. It should also keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with the FAO (Food and Agriculture Organization of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimising the use of resources.

More information about the Committee's work may be obtained by writing to:

Timber Branch
UNECE Trade Development and Timber Division
Palais des Nations
CH - 1211 Geneva 10, Switzerland
Fax: + 41 22 917 0041
E-mail: info.timber@unece.org
Web site address: http://www.unece.org/trade/timber

UNECE/FAO Publications

Timber Bulletin* Volume LVI (2003) ECE/TIM/BULL/2003/...

1. Forest Products Prices, 2000-2002 (web data release expected March 2004, hard copy expected May 2004).
2. Forest Products Statistics, 1998-2002 (database since 1964 on website, publication available on the web March 2004, hard copy expected April 2004).
3. Forest Products Annual Market Analysis, 2002-2004 (available on web, hard copy expected March 2004).
4. Forest Fire Statistics, 2000-2002 (web data release expected March 2004, hard copy available May 2004).
5. Forest Products Trade Flow Data, 2000-2001 (tables available on web, no hard copy available).
6. Forest Products Prospects for 2004 (available on web, hard copy expected February 2004).

**Timber Bulletin series is currently under review*

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(Country profiles also exist on Albania, Armenia, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Georgia, Hungary, Lithuania, Poland, Romania, Republic of Moldova, Slovenia and Ukraine)	
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The Development of European Forest Resources, 1950 to 2000: A Better Information Base	ECE/TIM/DP/31 *-in processing*
Modelling and Projections of Forest Products Demand, Supply and Trade in Europe	ECE/TIM/DP/30 *-in processing*
Employment Trends and Prospects in the European Forest Sector	ECE/TIM/DP/29
Forestry Cooperation with Countries in Transition	ECE/TIM/DP/28
Russian Federation Forest Sector Outlook Study	ECE/TIM/DP/27 *-in processing*
Forest and Forest Products Country Profile: Georgia	ECE/TIM/DP/26
Forest certification update for the UNECE region, summer 2002	ECE/TIM/DP/25
Forecasts of economic growth in OECD and central and eastern European countries for the period 2000-2040	ECE/TIM/DP/24
Forest Certification update for the UNECE Region, summer 2001	ECE/TIM/DP/23
Structural, Compositional and Functional Aspects of Forest Biodiversity in Europe	ECE/TIM/DP/22
Markets for secondary processed wood products, 1990-2000	ECE/TIM/DP/21
Forest certification update for the UNECE Region, summer 2000	ECE/TIM/DP/20
Trade and environment issues in the forest and forest products sector	ECE/TIM/DP/19
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Forest certification update for the UNECE Region, summer 1999	ECE/TIM/DP/17
A summary of "The competitive climate for wood products and paper packaging: the factors causing substitution with emphasis on environmental promotions"	ECE/TIM/DP/16
Recycling, energy and market interactions	ECE/TIM/DP/15
The status of forest certification in the UNECE region	ECE/TIM/DP/14
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Manual on acute forest damage	ECE/TIM/DP/7

International Forest Fire News *(two issues per year)*

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Timber Committee Yearbook 2004	ECE/TIM/INF/11

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E-mail: info.timber@unece.org

Downloads are available at http://www.unece.org/trade/timber

TIMBER AND FOREST INFORMATION SERIES

The aim of the ***UNECE Timber Committee Yearbook 2004*** is twofold: to provide an overview of the Committee's activities; and to provide bibliographical references, so that interested experts may obtain the necessary documents as quickly and easily as possible. All the Committee's activities are carried out jointly with the FAO European Forestry Commission in the context of an integrated programme of work.

UNECE Timber Committee and FAO European Forestry Commission

Further information about forests and forest products, as well as information about the UNECE Timber Committee and the FAO European Forestry Commission is available at the website http://www.unece.org/trade/timber. Information about the UNECE may be found at http://www.unece.org and information about FAO may be found at http://www.fao.org.

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